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Nearly 3 in 4 advisors say their firms invest in career development
By Rob Burgess
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Nearly three-quarters of financial advisors say their firms offer professional development programs, from CFP exam support to in-house training, according to the latest Financial Planning research.

In February's Financial Advisor Confidence Outlook (FACO) survey, advisors most commonly cited internal training programs or workshops (64%). Roughly 6 in 10 reported their firms cover conference or industry event costs; reimburse for professional certifications and designations; or provide licensing exam prep, fees or continuing education.

More than half said their firms also cover membership fees for professional organizations (53%) or offer ownership, succession or career-path education (53%).

For many advisors, that support can be a deciding factor in choosing, and staying with, a firm.

Theresa Pablos, associate financial advisor at Equalis Financial in Los Angeles, said the emphasis on professional development was a major reason she joined her current firm, which covers continuing education, conference attendance and professional fees, including for CFP certification and NAFPA membership, she said.

"I firmly believe that commitment to continuous professional development directly benefits clients by strengthening the entire team's ability to continuously improve the service we provide to clients and adapt to ongoing industry, economic and regulatory changes," she said.

Advisors say the availability of these sorts of opportunities and support is essential if firms seek to develop the next generation of talent in the industry.

Some firms are building in-house educational platforms
For some firms, developing their own programming and learning platforms has been particularly fruitful.

Max Hood, senior advisor at Moneta in St. Louis, said his firm runs an ongoing professional development series called Advisor Bootcamp, which meets throughout the year. The program is aimed at up-and-coming advisors and invites outside presenters, Moneta partners and others to share career stories and advice, he said. Moneta also offers a learning platform, Moneta University, which includes articles and videos on technology, estate planning, tax coordination and strategy, investment management and philosophy, philanthropy, budgeting and more.

"Our culture promotes a chance to learn individually, while we grow with the insights of the members of our team who have a wealth of experience," he said.

Certifications, continuing education and participation remain key
Similarly, Scott Brown, president of investment management firm Pinnacle Associates in New York City, said his firm offers the Pinnacle Training Academy, which provides ongoing education across financial planning, client service and business development.

The firm also supports professional certifications and continuing education, including CFP and other role-relevant designations, and generally covers costs associated with industry conferences, training programs and workshops.

"Advisors are encouraged to participate in professional organizations and continuing education aligned with their roles," he said. Pinnacle also offers advisors the chance to participate in firm committees.

"These groups give advisors exposure to senior leadership, investment decision-making and firm strategy, while fostering mentorship and collaboration across teams and career stages," he said.

Samantha Mockford, associate wealth advisor with Citrine Capital in San Francisco, said her firm pays for memberships to Kitces.com and Dimensional Advisors, which both offer access to webinars, white papers and more. Her firm also covers membership and recertification fees and conference attendance.

"Back when I had passed the CFP exam but had insufficient experience hours under my belt to have the marks after my name, my firm paid for me to study and sit for the Series 65 exam, so that I could legally place trades for clients," she said.

And beyond more traditional learning opportunities, Mockford said her firm also encourages hands-on volunteerism.

"In the spirit of giving back, they also incentivize and reimburse us for expenses when we volunteer our time and expertise, developing folks in our respective communities," she said.